



Australian Government

BSBAT511 Lead the organisation's strategic planning cycle

Release: 1

BSBAT SIL511 Lead the organisation's strategic planning cycle

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 1.0.

Application

This unit describes the skills and knowledge required to lead the strategic planning process of an organisation, and assist board members develop and implement a strategic planning cycle.

It applies to individuals responsible for planning, monitoring and guiding the activities of the organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Regulation, Licensing and Risk – ATSI Governance

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
<i>Elements describe the essential outcomes.</i>	<i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>
1 Establish strategic planning process	1.1 Agree to a documented strategic planning process with other board members 1.2 Identify and allocate resources to undertake strategic planning
2 Develop and review organisation's values, vision and purpose	2.1 Consult board members, management, staff, community and key stakeholders on values, vision and purpose of the organisation 2.2 Identify agreed values, vision and purpose of the organisation with other board members 2.3 Ensure organisation's values, vision and purpose are documented and endorsed by the board
3 Analyse internal and	3.1 Review and evaluate the previous strategic plan

ELEMENT	PERFORMANCE CRITERIA
external factors that could impact on organisation's strategic plan	3.2 Identify and analyse community aspirations, interests and needs 3.3 Identify and analyse changing government policy and funding that might affect the organisation 3.4 Identify and analyse emerging and predicted trends 3.5 Identify and analyse potential for strategic alliances and partnerships 3.6 Seek advice from appropriate experts when necessary
4 Establish strategic objectives and strategies	4.1 Develop and agree on strategies and SMART objectives with other board members, consistent with outcomes of research and analysis undertaken 4.2 Ensure objectives and strategies are achievable and benchmarked against industry and community standards 4.3 Identify and document factors that may affect achievement of objectives
5 Monitor and evaluate strategic performance	5.1 Develop an implementation plan with other board members identifying targets, key performance indicators, performance standards, timelines and reporting requirements for the strategic planning period 5.2 Monitor and evaluate progress reports against the plan to identify successes and performance gaps 5.3 Review and revise strategic objectives and strategies with other board members where necessary

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

Skill	Performance Criteria	Description
Reading	2.3, 3.1-3.5, 4.1, 4.3, 5.2, 5.3	Gathers, interprets and analyses textual information from a range of sources and identifies relevant and key information
Writing	1.2, 2.2, 2.3, 3.1-3.6, 4.1, 4.3, 5.1-5.3	Uses appropriate vocabulary, grammatical structure and conventions to develop and update workplace documentation

Oral Communication	1.1, 2.1-2.3, 3.2, 3.6, 4.1, 5.1, 5.3	• Uses active questioning and listening techniques to elicit information and confirm understanding • Participates in verbal exchanges using clear language, suitable syntax and tone to address and disseminate relevant information to a wide variety of individuals
Numeracy	1.2, 4.2, 5.1, 5.2	• Interprets numerical information and applies basic mathematical calculations to manage available resources and evaluate performance
Navigate the world of work	3.1, 3.3	• Monitors adherence to government policy and organisational procedures • Considers own role in terms of its contribution to broader goals of work environment
Interact with others	1.1, 2.1, 2.2, 3.2, 3.6, 4.1, 5.1, 5.3	• Selects and uses appropriate conventions and protocols when communicating with internal and external stakeholders in a range of work contexts • Collaborates with others to achieve joint outcomes, playing an active role in facilitating effective interactions
Get the work done	1.2, 2.2, 3.1-3.5, 4.3, 5.1-5.3	• Organises time and effort around priorities, results and realistic timeframes • Recognises importance of other stakeholders through the planning and implementing process, clarifying goals and proposed methodology with others, maintaining communication and managing expectations and understanding • Uses experiences as means to reflect how variables impact decision outcomes, and to gain insights into what constitutes 'good' judgement and an effective decision in different contexts • Uses ideas proposed by others as provocations and stepping stones to new perceptions and ideas

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBATSIL511 Lead the organisation's strategic planning cycle	BSBATSIL511A Lead the organisation's strategic planning cycle	Updated to meet Standards for Training Packages	Equivalent unit

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>